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## **Market Brief - Sector**

# **Austria : Gas Station Shops, a Growing Food Outlet Sector**

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Vienna [AU1], AU

## Summary

The number of gas station shops and their food and beverage turnover are expected to continue to rise. In general, these shops belong to big gas station chains but are rented to individuals. U.S. exporters interested in supplying this market should contact wholesalers servicing gas station shops. The greatest opportunities for U.S. products are in the snack food sector.

## General

According to a Nielson survey, Austrian gas station minimarts had a food turnover of AS 5.6 billion in 1997. This amount corresponds to about four percent in the food turnover of the special food retail trade.

Gas station shops have been gaining in significance for a long time. Of the 3,254 Austrian gas stations, 2,775 included a shop at the beginning of 1998. However, each year the number of gas station shops rises by 50-100. The average turnover per shop is AS 2 million, and per square meter of sales area around AS 55,000. Due to the strong upward trend, an area productivity of AS 100,000 is regarded as a realistic possibility in the long term future.

Gas station shops are important as they are generally the only place legally open to sell food and sundries after working hours and on Sundays.

A slight liberalization of retail business opening hours to permit retailing on Saturday afternoons has posed some disadvantages for gas station shops, as many customers shop in them when normal food shops are closed. However, some gas station chains also see great opportunities for their shops and advocate the full liberalization of business hours. They regard convenience shopping as a great chance and a profitable supplement to the retail food trade. Gas station shops appeal to a special group of customers and will remain frequented under certain purchasing conditions. The growth potential for gas station shops is not yet exhausted by far, particularly because advertising for these shops has been only marginal up to this point.

The largest sales numbers are achieved by confectionary products, and non-alcoholic drinks. Total drinks sold account for around 50% of total sales.

### Share of Commodity Turnover in Gas Station Shops:

non-alcoholic drinks	28%
alcoholic drinks	22%
confectionaries	42%
other foods	6%
pet food	2%

More than one third of the population buys occasionally in gas station shops although an important commodity group cannot be obtained there. Due to the present legislation, frozen vegetables cannot be sold by these shops.

### Company Share of the Total Number of Gas Station Shops:

Austrian Mineral Oil incl Elan	26.8%
Shell	15.5%
Mobil	15.0%
Aral	9.4%
Agip	8.3%
BP	8.0%
Esso	4.6%
Jet	2.6%
others	9.8%

The large gas companies operate their shops under certain names which are Mini-Markt & Bistro for Aral, Ciao Agip for Agip, Viva Stop & Shop-Store for OMV, Select for Shell, Snack & Shop for Esso, Jet-Shop for Jet-Conoco.

The food and beverage sales of gas station shops, which already cover a relatively large share of the Austrian food market, are growing. Thus, American food companies may be interested in supplying these outlets. Among U.S. products, snacks, particularly dried fruits, nuts and various mixtures of these products should have the best market opportunities.

Generally, foods and beverages are obtained from wholesalers which have a special branch for serving gas station shops. The main companies are Lekkerland, Kinast, and Kastner. Lekkerland is by far the largest company.

In general, gas station chains determine the products to be placed on shelves of their company stores. Thus, it makes no sense to offer any products to gas station shops which are usually rented by individuals. All offers should be directed to the wholesalers who forward and discuss these offers with the gas station chains.

Exchange rate: \$1.00 = AS 13.00

### **Wholesalers Serving Gas Station Shops**

Lekkerland AG  
Handelsstr. 1  
A - 2630 Ternitz

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Fax: + 43 (2630) 36 415 33

Julius Kiennast  
Hauptplatz 7  
A - 3571 Gars am Kamp

Phone: + 43 (2985) 2341  
Fax: + 43 (2985) 2942

Kastner Grosshandels Ges.m.b.H  
Attn. Mr. Christof Kastner  
A - 3910 Zwettl

Phone: + 43 (2822) 524 34  
Fax: + 43 (2822) 524 34 121